

PREPARING FOR 2018

SBOA Clerk's Conference
Matthew Kochevar, Co-General Counsel
Patrick Becker, Director of Special Projects

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Public Records – VR Electronic

- Includes:
 - Entire county list in SVRS.
 - Individual voter's record in SVRS.
 - SVRS produced reports.
- Unlike IED, county VR officials are not restricted in the type of information provided from SVRS.
 - ONLY restriction is full social security number (no longer used) and the "full service" VR location where person registered.
 - Name, DOB, Address, Vote History, Voter ID #, etc., are to be provided; unless county policy dictates otherwise.
- Request for SVRS records must be made on the VRG-24.
 - Form covers any request for information from SVRS:
 - County voter file.
 - SVRS report.
 - Individual voter record out of SVRS.

IC 3-7-27-6

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Public Records – County Policy

- Response to request electronic information from SVRS info should follow *nondiscriminatory uniform policy* adopted by CEB.
 - Policy must either permit a person to obtain an electronic copy of information in SVRS; or
 - Not permit a person to obtain a copy of the information.
- Policy will cover:
 - Full county voter list.
 - SVRS reports.
- Policy does not cover:
 - Request for individual voter registration information.
 - Reports already created.

IC 3-7-27-6

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Voter List Maintenance Data Sources

- Self-reporting
- Death Data:
 - Indiana Department of Health:
 - STEVE
 - Death Master File
 - Local Health Dept. Reports to County Auditor
 - Obituaries
 - Death Certificates
- Voter Removal Programs:
 - Statewide postcard mailer
 - NCOA, Interstate mailers; others authorized by Indiana law
- Interstate Crosscheck ("Kansas" program)
- Other state lists (see IC 3-7-38.2-5(c))
- Disenfranchisement due to Imprisonment:
 - U.S. Northern & Southern District Court of Indiana
 - Indiana Department of Correction
 - County Sheriff reports

IC 3-7-38.2 | IC 3-7-39 | IC 3-7-43 | IC 3-7-45

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VLM Data Sources

- Not all VLM sources require moving a voter through active->inactive->cancellation.
- Various data points can lead a voter's registration to be cancelled instead moved to inactive status:
 - Voter requests registration cancellation;
 - Voter is deceased and county receives proper legal notice; and
 - Voter is convicted of a crime and is currently incarcerated.
- Voter "removal" processes are outline in federal & state law.
 - Do not deviate from procedures established in law to perform certain VLM activity.
 - Various SOPs and other instructional documents have been developed and updated by the Core Team to assist in the execution of these procedures.

IC 3-7-38.2 | IC 3-7-39 | IC 3-7-43 | IC 3-7-45

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County Sheriff's Report

- SEA 44 (P.L. 74-2017), Sec. 18 requires IED to prescribe the form county sheriffs will use to report who is incarcerated after conviction in the county jail, after July 1, 2017.
 - Co-Directors will be sending out a survey to county VR officials asking what information they need to be on the report.

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Special Elections – November 2017

- Certain referendums can be called as a special election to occur on November 7, 2017.
- Most referendums will have an August 1 deadline to complete the process of getting the public question on the ballot.
 - DGLF has resources regarding certain referendums.
 - <http://www.in.gov/dlgr>

Note: All cost for holding a special election in November for building project bonds and school tax levy referendums are to be paid by the political subdivision that called for the special election.

IC 6-1.1-20-3.6 | IC 20-46-1-14

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Special Elections – November 2017

- Special elections are conducted like any other election.
 - Polls are open on election day from 6 am to 6 pm (local prevailing time).
 - Voter registration must close 29 days before election in precincts where election occurs.
 - SVRS has ability to close off VR in part of county holding special election.
 - All absentee voting methods must be offered.

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Special Elections – ABS Voting

- CEB can start to receive ABS applications as soon as the special election is called.
 - Deadline for ABS-Mail applications:
 - 11:59 pm, Monday, October 30, 2017, for civilian voters.
 - Noon, November 6, 2017, for UOCAVA voters requesting ABS-Mail ballot by fax or email.
 - Deadline for ABS-Travelling Board applications:
 - Noon, November 6, 2017.
 - Deadline to vote in-person in clerk's office and satellite locations:
 - Noon, November 6, 2017.

IC 3-11-4-3

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Special Elections – ABS Voting

- CEB may reduce days & hours of in-person absentee (early) voting during special elections.
 - CEB needs to pass a resolution, by unanimous vote, stating:
 - The days and hours when absentee voting will be conducted.
 - The number of ABS applications anticipated or previously received for the special election.
 - The expense to be incurred if in-person absentee voting was offered for the standard period.
 - Statement, "voters would experience little or no inconvenience by restricting absentee ballot voting in the office to the days and hours specified in this resolution."

IC 3-11-10-26.3

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Special Elections – Absentee Voting

- If resolution to reduce early voting period is passed, then mailing of absentee ballots to civilian voters may start*:
 - On the first day in-person absentee voting is to begin under the resolution;
 - 45 days before the election for all application approved by that date; or
 - When the ABS-Mail application is received and approved.
 - Whichever occurs last.

**Leave enough time to properly conduct ABS-Mail operation.*

IC 3-11-10-26.3

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Special Elections – Polling Locations

- To cut costs CEB may consolidate polling locations.
 - Additional savings can be found in having one set of poll workers run multiple precincts at one location.
 - Can be done by passing either:
 - Resolution authorized by IC 3-11-8-4.3, OR
 - Resolution authorized by IC 3-10-8-6(b).

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Special Elections – Polling Locations

- IC 3-11-8-4.3:
 - A unanimous CEB passed resolution, with the cooperation of the county executive, to place adjoining precincts polling sites in location.
 - Order can also provide that one precinct board (1 inspector, 2 judges, and 2 clerks [if used]) administer election for each precinct at the polling location.
 - All ballots and election materials of each precinct must be kept separate (remind poll workers at training).

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Special Elections – Polling Locations

- IC 3-10-8-6(b):
 - A unanimous CEB passed resolution that places several precincts polling locations at same site.
 - Section is broad – several could be viewed as all.
 - Resolution must include statement that consolidation would not result in undue inconvenience to voters.
 - All ballots and election materials of each precinct must be kept separate (remind poll workers at training).

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2018 Primary Ballot Access

- For Democratic & Republican U.S. Senate candidates to qualify for primary ballot:
 - Collect a minimum of 4,500 signatures of registered voters statewide.
 - Minimum 500 from each of the state's nine (9) congressional district.

IC 3-8-2-8

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2018 Ballot Access

- Minor party and independent candidate for any partisan elective office:
 - Collect minimum 2% of total votes cast in election district for Secretary of State in 2014.
- IED has computed minimum number of signatures needed for statewide and countywide offices.
 - See 2016 Candidate's Guide ("red" book).
- IED gives unofficial minimum to candidates for state legislative races upon request.
- For candidates for local office:
 - County official will need to pull 2014 SOS results from precincts that make-up election district to determine minimum signature requirement.

IC 3-8-6-2

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Ballot Petition

- Two ballot petition forms have been released for the 2018 election.
 - CAN-4:
 - Used by Democratic and Republican party candidates for U.S. Senate to get on May primary ballot.
 - CAN-19:
 - Used by independent and minor party candidates for any partisan elected office on November ballot.
 - Applies to candidates running for U.S. Senator through township board.
- Other candidate forms will be made available in soon.

IC 3-8-2-8 | IC 3-8-6-2

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Ballot Access

- Filing to run for office in 2018 is a two step process for:
 - All Ds & Rs running for U.S. Senator.
 - All independent and minor party candidates.
- Step One: File petitions with county VR official to certify signatures.
- Step Two: File all required candidate docs with county clerk or IED.
 - Ds & Rs file CAN-2 and CAN-4s.
 - Ind. & minor party file CAN-20, CAN-19s, and statement of economic interest.

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What's in the CAN-4?

- Instructions for candidates and petition gatherers.
- Box to mark which party the candidate is running under.
- Space for:
 - Candidate's name.
 - Address (can use campaign address).
 - Office sought (will only be US Senator).
- Up to ten (10) spaces for voters to sign, provide name, DOB, and registration address.
- Petition Carrier Certification.
 - Must be completed for signatures to be verified.
- Two counties can verify the signatures of their voters on the back.
- Affidavit for those who assisted a voter with filling out the petition.

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What's in the CAN-19?

- Instructions for candidates and petition gatherers.
- Box to select if candidate is an independent or a member of a minor political party.
- Area for candidate's name, address, office sought, and symbol of political party device for inclusion on ballot.
 - For minor party, up to four candidates can be on the same petition (ex. Four candidates running for different county-wide office).
- 10 spaces for a voter's signature, name, DOB, and registration address.
- Two counties can verify their voter's signatures.
- Petition carrier certification.
- Affidavit of assistance.

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Submission of Petition Forms

- Petitions cannot be accepted by county VR official until Wednesday, January 10, 2018.
- CAN-4s can be accepted up to Noon, Tuesday, February 6, 2018.
 - D & R candidates for U.S. Senate only.
 - VR official has 3 week window to certify signatures.
- CAN-19s can be accepted by county VR up to Noon, Monday, July 2, 2018.
 - June 30 is a Saturday, law moves deadline to next business day.
 - Independent & minor party candidates only.

IC 3-8-2-10 | IC 3-8-6-10

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Certifying Signatures

- When petition is submitted, VR official will compare the following to voter's SVRS record:
 - Voter's signature;
 - Voter's name; and
 - Voter's registration address.
- If information on petition matches what is in SVRS the signature must be certified as a valid.
- DOB field is not a required field.
 - Does not invalidate signature if left blank or filled in incorrectly.
 - Column added to assist VR official in looking up voter in SVRS.
- There are standards to determine if a signature is valid.
 - IC 3-5-6.

IC 3-8-2-9(b) | IC 3-8-6-8

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Submission of Candidate Forms

- Deadline for D&R to submit candidacy forms to run in primary:
 - Noon, Friday, February, 9, 2018.
 - Senate candidates must file certified petitions & declaration of candidacy.
- Deadline for independent and minor party candidates to file for general election ballot placement:
 - Noon, Monday, July 16, 2018.
 - July 15 is on a Sunday; deadline moved to next business day.
 - Ind./minor party candidates must file certified petitions & declaration of candidacy

IC 3-8-2-4 | IC 3-8-4-10 | IC 3-8-6-10

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Submission of Candidate Forms

- Where to file:
 - Federal, statewide, state legislative, and judicial candidates:
 - File with Secretary of State or IED.
 - Prosecutor, circuit and superior court judges are judicial.
 - County, town, city, township, and school board candidates:
 - File with county clerk's office.
 - Libertarian party candidates are nominated at convention.

Note: Democratic and Republican candidates for Secretary of State, Treasurer, and Auditor are nominated at convention, and do not appear on the partisan primary election ballot.

IC 3-8-2-4 | IC 3-8-4-10 | IC 3-8-6-10

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Vote Center Amendments

- Vote Center Plan on file with IED must match how you administer election on Election Day.
- This includes but not limited to:
 - Current locations of vote centers.
 - Amount and what type of poll workers use at each vote center.
 - At least one precinct election board (1 inspector, 2 judges) must be used at every voter center location.
- Amendment requires unanimous approval by county election board.
- Amendment takes effect once it is filed with IED.

Note: Clerk's office must still be used for in-person (early) absentee voting.

Restocking Forms

- Before restocking forms remember many forms will be updated by IED Co-Directors, and provided at the annual conference (if not before).
- Before ordering or printing more forms:
 - Check Form revision number & date; and
 - Check with IED or Master Forms List to see if form is current.
- If printing or ordering forms after winter conference, check conference form list for valid form versions.
- Once form is updated the old form will be obsolete and legally cannot be used.
 - Exception: Co-Directors can provide that old form is grandfathered and legally be used.

USPS and ABS



- Set a meeting with USPS Election Mail Coordinator
 - Include anyone designing, ordering, addressing/preparing mail
 - Include outside mail service providers
 - Establish plan for returned/undeliverable mail
 - Inform local USPS of mailing requirements and deadlines
 - Delivery times
 - Holding mail for pickup
 - Election Day pickup
 - Discuss past practices and seek improvements
 - Internal timelines and turnaround
 - Bulk mailing – postage requirements and discounts
 - Green Tag 191
 - Postal Explorer – pe.usps.com



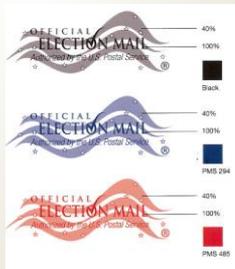
ABS Envelope Design



- USPS Mailpiece Design Analyst (MDA)
 - **Call 855-593-6093; 7 am – 5 pm CT**
 - Free service provided by USPS to analyze mailpiece design
 - Provide samples to MDA (can be new designs or past used designs)
 - Ask MDA to...
 - Help you design outgoing and return envelopes to meet automation-compatibility standards.
 - Review and help with proper wording and placement of postal markings and endorsements on envelopes
 - Review blueline or PDF file of your envelopes, postcards, and other mail before it is printed.

ABS Envelope Design

- Use "Official Election Mail" logo
 - Used only by federal, state, local government voter registration and election officials
 - Only used on official election mail – not partisan mailings
 - Must conform to USPS guidelines
 - Placement must not interfere with postage, address, return address, or barcode zone



ABS Envelope Design

CORRECT USE

INCORRECT

Clearance Area – Allow at least 1X the largest print used in the respective size logo or 1" whichever is larger.

ABS Envelope Design

- A few reminders...
 - Scale return address on "carrier" envelope to SVRS generated address label size
 - DYMO™ 30252 labels – 1-1/8" x 3-1/2"
 - Consult USPS when using barcodes
 - Ideal for return ballot envelopes
 - "Carrier" envelope must contain:
 - "Live" ballot
 - postage-paid return envelope
 - absentee voter bill of rights
 - ballot marking instructions and "notice" to the voter if mistakes are made and replacement ballot is necessary.
 - ****size and weight of mail packet determines postage****
 - Other thoughts and ideas? Best Practices?



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Precinct Boundary Changes

- Timeline:
 - May 10, 2017 - Co-Directors sent memo to counties
 - June 23, 2017 - Survey responses due to Election Division
 - Complete survey if reprecincting is a possibility in 2017
 - August 11, 2017 - Precinct Establishment Order and ALL accompanying documents due to Election Division
 - December 30, 2017 – Publish legal notice after IED approves order (*at least ten days before January 9, 2018*)
- Draft precinct establishment orders on county portal
 - Along with packet of information sent out in May
- Completed IEC-8s must be included with precinct establishment order
- Attach boundary descriptions
 - Annexation orders, census block data, aerial photography, etc.

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Precinct Boundary Changes

- When should you consider reprecincting?
 - Has your county approved municipal annexations?
 - Municipal Election in 2019!
 - Have you seen substantial population growth or increase in number of active voters in a precinct in your county?
 - Has your county zoned for new residential development?
 - Has your county had local district lines re-drawn?
 - Do you currently have split precincts?
 - Last opportunity to address splits before 2018 election.



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Precinct Boundary Changes

- Consult local GIS department (if available)
 - Do research on past reprecincting efforts in your county
- Engage in discussion with interested parties
 - County executive
 - County chairs
 - Election board
 - County attorney
 - Any other interested parties?
- Election Division is here to help!!
 - Lori Clark – lclark27@iec.in.gov | 317-232-3938
 - Patrick Becker – pbecker@iec.in.gov | 317-233-5247



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SVRS Security and Tips

- Setting up new user accounts
 - Use the person's actual information – not generic
 - Username should be amalgamation of last name and first letter of first name
 - Can use same email address for multiple users
- Always set an expiration date for user accounts
 - Can be end of clerk term for full-time/returning
 - New expiration date can be set using "edit user"
- Set up sandbox accounts first!
 - New users should be trained in sandbox before going into production site
 - All training should be done in sandbox



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SVRS Security and Tips

- Passwords
 - Never give out passwords
 - Co-workers
 - Tech support
 - Written notes
 - Never use the same password for work and personal accounts
 - Passwords shouldn't be reused
 - 56% of employees admitted on some level of daily password reuse (SailPoint, 2015)
 - Always log out of software or lock computer
 - Don't allow opportunity for someone to do work under your username



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General Security Tips

- Don't store sensitive documents/information on mobile storage devices
 - Flash drives, external hard drives, cell phones, tablets
- Beware of phishing emails
 - 200 billion sent each day (Multi-State Information Sharing & Analysis Center, 2015)
 - 8 million opened each day (Thawte, 2013)
 - 800,000 people clicked malicious links every day
- Don't negatively impact computer/network resources
 - Streaming music/videos
 - Social media
- Always report security incidents!!



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Questions

Angela Nussmeyer
Co-Director
 317-232-3940
 anussmeyer@iec.in.gov

Brad King
Co-Director
 317-233-0929
 bking@iec.in.gov

Matthew Kochevar
Co-General Counsel
 317-232-3942
 mkochevar@iec.in.gov

Dale Simmons
Co-General Counsel
 317-232-3929
 dsimmons@iec.in.gov

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